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# SAMS Job Aid

## Social Assistance Management System

### Service Template Creation



### SPURS Project

## Department of Aging and Disability Services (DADS)

Job Aid



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## Version Control: SAMS Job Aid: Service Template Creation

Version	Release Date	Changes and Comments
1.0	06/11/2009	Initial Release

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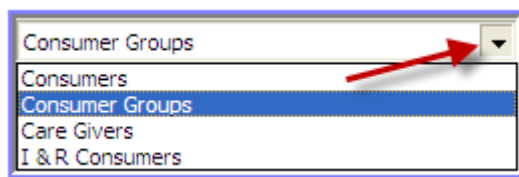
## Service Templates

At the conclusion of a call session in SAMS, there exists functionality to automatically create service delivery records for the consumer selected in the call or for an aggregate group in the case of anonymous calls; this is done through the use of Service Templates. Service Templates have been created for I,R&A and Legal Awareness services coming from each of the 28 Area Agencies, but in the cases where the Agency outsources Information & Assistance to a Provider or ADRC Partner, additional Service Templates can be created with the following steps.

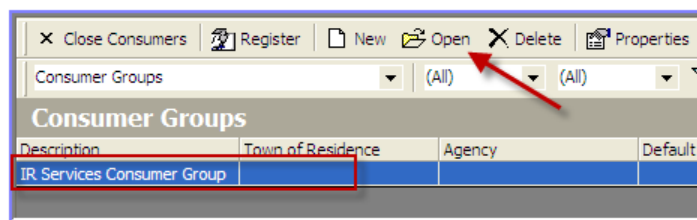
### Creation of a Service Template

To create a new Service Template:

1. Log into SAMS and go to the **Consumers** section.
2. In the **Type** dropdown in the toolbar, select *Consumer Groups*.



3. Select and **Open** the group called *IR Services Consumer Group*.



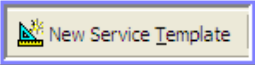
4. Click the **Service Delivery** button on the *Navigation* pane.
5. Click **Add Service** in the toolbar and select the current month for the *Service Period*.

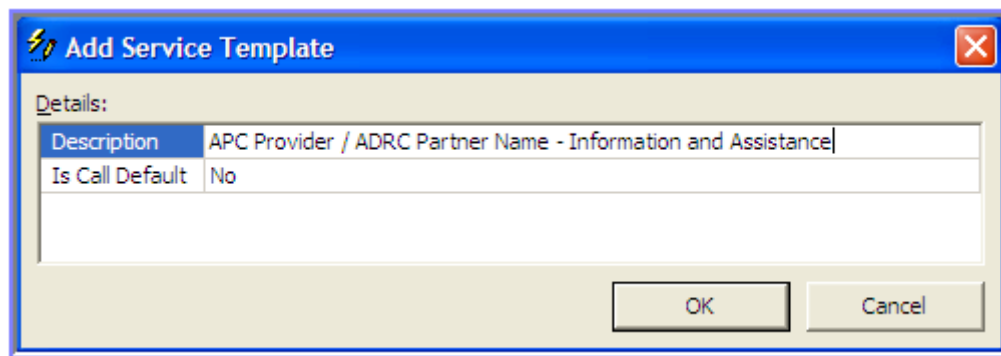


#### **NOTE**

The service record being added is only temporary for the creation of the Service Template.

6. Select the service attributes appropriate for the new provider as follows:
  - a. **Care Program** = (If applicable)
  - b. **Agency** = *Select your Agency*
  - c. **Provider** = *Select the Provider*
  - d. **Service** = Information, Referral and Assistance (Contact)

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7. **Apply and Close** the service record.
  8. Select the new record in the list of services and click **New Service Template**  in the toolbar.
  9. Enter a **Description** for the new template and make sure **Is Call Default** is set to 'No'.

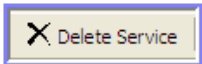


Details:	
Description	APC Provider / ADRC Partner Name - Information and Assistance
Is Call Default	No



**NOTE**

Although no naming convention has been established, the current templates set up for the Agencies use the convention "*Organization Name – Information, Referral and Assistance*".

10. Select the service record temporarily added for this process and click **Delete Service**  in the toolbar.



**Caution**

Only users set up as *AAA Administrators* in SAMS have the privilege necessary to delete service record.

11. **Save and Close** the Consumer Group record.